

---

### **Quick Reference Guide:**

## ***Creating Households***

*This guide will explain the basic process for creating households in AIM.*

*Topics covered in this Quick Reference Guide include:*

- *Enrolling Students*
- *Adding Adults*
- *Adding Addresses*
- *Census Wizard*
- *Contact Information*
- *Non-Household Relationships*
- *Adding/Removing Household Members*
- *Splitting Households/Students with two Households*



Households are created in Infinite Campus to link students, parents/guardians and addresses for import into Special Education forms. Households are defined as the group of adults a student resides with – and students may have multiple households. Households define location and relationships. Follow the steps below to successfully create households.



### **Steps for Creating Households:**

#### **1. Enrolling Students**

- Students must be enrolled before they can be added to households.

#### **2. Adding Adults**

- Use the Census/Add Person tool to add adults.

#### **3. Adding Addresses**

- Use the Census/Add Address tool to add addresses for households. Addresses may be mailing, physical or both.

#### **4. Assembling Households**

- Use the Census Wizard tool to combine students, adults and addresses into households.

#### **5. Contact Information**

- Contact information may be added to individual household members if the IEP team wishes to include this information in their Special Education forms.

#### **6. Non-Household Relationships**

- Adults not residing in the student's household may be associated with the student.

## STEP 1 – Enrolling Students

Use the **Student Locator** or the File Upload method to enroll the student in the correct *Grade* and *Calendar*.

(path: Index, Student Information, Student Locator)

**Redford, Robert**  
Grade: 03 DOB: 01/16/2004 Gender: M

Demographics Identities Households Relationships **Enrollments** Districts

Print Enrollment History New New Enrollment History

Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
	04	P	14-15 Philipsburg School	08/27/2014	
Start Status: 02 Continued enrollment same school, no interruption					
End Status:					
	03	P	13-14 Philipsburg School	09/03/2013	05/31/2014
Start Status: 04 Transfer from public school in district or state					
End Status: 100 End of year, returning to same school next year					

Index Search Help <

File Labels By DOB  
Folder Labels by DOB  
No Show Report  
Process Compliance  
Service Detail  
Service Provider Detail  
Service Provider Summary  
Service Summary  
State Enrollment Overlap  
State Enrollment Verification  
Graduation Cohort Validation  
Test Accommodations (de)  
Test Results

> Instruction  
▼ Census  
People  
Households  
Addresses  
Add Person

**Person Search**  
Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.

\*Last Name Redford  
First Name  
Middle Name  
Birth Date  
Gender  
Search

Create New Person

## Step 2 – Adding Adults

Use the **Add Person** tool in the **Census** module to add adults that live in the student's household(s).

From the **Index**, expand **Census** and click **Add Person**.

Enter the person's last name and click **Search**.

If the person does not appear on the screen details, click **Create New Person** at the lower righthand corner of the screen.

Enter *Last Name*, *First Name* and *Gender*.

Click **Save**.

Repeat for all adults associated with the student's household(s).

**NOTE:** Do **not** create students using the **Add Person** tool – use the **Student Locator**.

**New Person**

**Person Creation**

Fill out the form to create a new Person in Campus. Click save to create the person, afterwards, they will appear in the list below.

**Person Information**

\*Last Name: Redford, \*First Name: David, Middle Name: , Suffix:   
\*Gender: Male, Birth Date: , Soc Sec Number:   
**Race/Ethnicity**  
Is the individual Hispanic/Latino?   
Is the individual from one or more of the these races?  
(check all that apply)  
☐ American Indian or Alaska Native  
☐ Asian  
☐ Black or African American  
☐ Native Hawaiian or Other Pacific Islander

Save

**Add Address**

**Address Search**

Search for an address already tracked in Campus us

House/P.O. #: 1227, Street Name: , Street Tag: , Apt #: , City: , Home Phone: ( ) - - x   
Search   
New Address

Index: Search, Help, <   
File Labels By DOB   
Folder Labels by DOB   
No Show Report   
Process Compliance   
Service Detail   
Service Provider Detail   
Service Provider Summary   
Service Summary   
State Enrollment Overlap   
State Enrollment Verificati   
Graduation Cohort Validati   
Test Accommodations (de   
Test Results   
► Instruction   
▼ Census   
People   
Households   
Addresses   
Add Person   
Add Household   
Add Address   
Staff Locator

### STEP 3 – Add Address

Use the **Add Address** tool in the **Census** module to add an address for the student's household.

From the **Index**, expand **Census** and click **Add Address**.

Enter only the *House/P.O.* number. Click **Search**.

If no match exists, click **New Address** at the lower righthand side of the screen.

**Address Creation**

**Address Creation**  
Fill in the fields below. This will create a new Address object in the database and then continue on to the next Process Step.

---

**Address Information**

P.O. Box	Number	Prefix	Street	Tag	Direction	Apt
<input type="checkbox"/>	1227		Rimrock Rd			
City	State	Zip	County	Location Code		
Happyville	MT	59233				
Latitude	Longitude	Tract	Block			
<input type="text"/>	<input type="text"/>					
Comments						
<input type="text"/>						
District						
<input type="text"/>						

Complete the **Address Information** fields as applicable.

Click **Save** at the lower righthand side of the screen.

**Note:** For a P.O. Box, check *P.O. Box*, enter *Number, City, State* and *Zip*.

## STEP 4 – Census Wizard

Use the **Census Wizard** Tool in the **Census** module to assemble the household.

From the **Index**, expand **Census** and click **Census Wizard**.

Index Search Help <

System Administrator  
 > Student Information  
 > Instruction  
 > Census  
   People  
   Households  
   Addresses  
   Add Person  
   Add Household  
   Add Address  
   Staff Locator  
**Census Wizard**  
   Tools  
     Staff Data Extract  
   Reports  
 > Behavior  
 > Health  
 > Attendance

**Census Wizard**

**Step 1 - Assemble New or Select Household**  
 This wizard will walk you through the process of creating a new household or editing an existing household. Start by searching for a household, person, or address.  
 • To Edit a household, simply click on the Household name in the search results.  
 • To Assemble a new household, select people and/or addresses in the search results.  
 If you enter a first and last name, you can create and link in a new person into the household. If you enter a house number and street you can create a new address.

<b>Person Search</b> Last Name First Name Student Number Birth Date Gender Middle Name Suffix <b>Address Search</b> House/P.O. Number Street Name Apt Number City <b>Household Search</b> Household Name Home/Other Phone	<b>Household</b> <div style="border: 1px solid black; height: 100px; width: 100%;"></div> <div>         Continue - Step 2 &gt;         Clear Household       </div>
--	--

Search Clear Search Fields

Under **Person Search**, enter the student's *Last Name*.

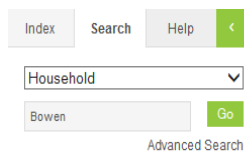
Click **Search** (under **Person/Address/Household Search**).

Click the student's name from the **Census Wizard Search Results**.

If the parent/guardian's name(s) also appear in the *Search Results*, click their name(s) to add them to the household.

If the parent/guardian's name(s) are different than the student, enter their last name.

Click **Search** and add them to the household.



Census Wizard Search Results: 2

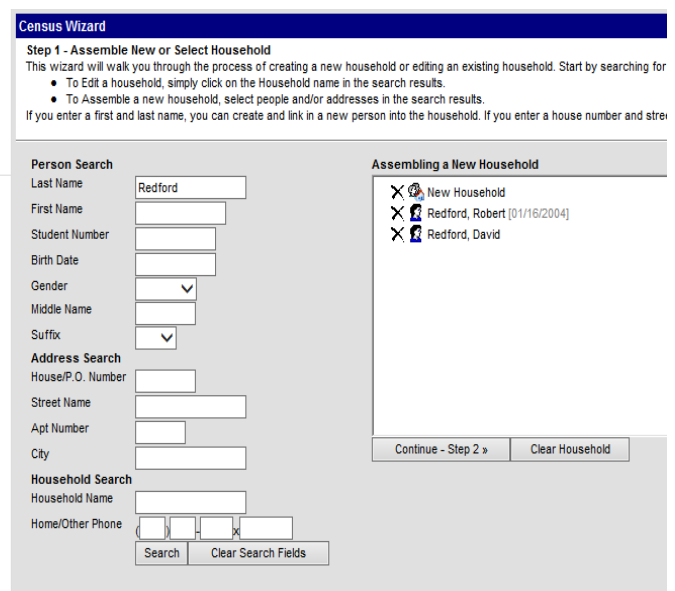
**People not in Households**

Details

Redford, Robert [01/16/2004]

Details

Redford, David

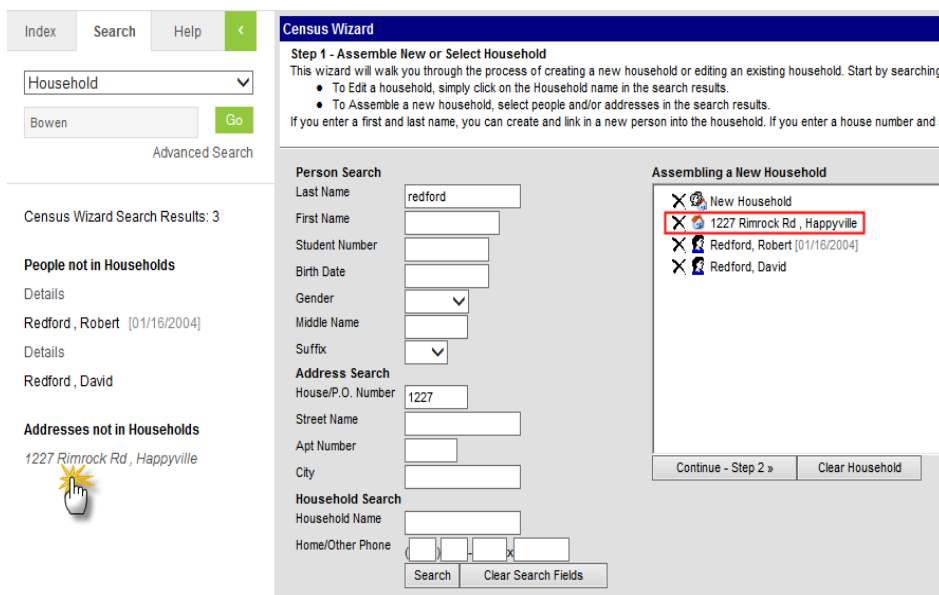


Enter the *House/P.O. Number* under **Address Search**.

Under **Person/Address/Household Search**, click **Search**.

Click the *Address* from the **Census Wizard Search Results**.

If the student has more than one address, repeat the search and add the second address to the household.



**Assembling a New Household**

- X New Household
- X 1227 Rimrock Rd , Happyville ✓
- X Redford, Robert [01/16/2004] ✓
- X Redford, David ✓

Continue - Step 2 » Clear Household

Verify that the following are in the household box:

- **Student**
- **Parent/guardian(s), and;**
- **Address(es)**

Click **Continue – Step 2**.

Enter *Household Phone Number*.

Enter *Start Date* for the **Address** and click *Mailing* (if applicable).

**Census Wizard - Edit Household Membership**

**Step 2: Editing Household Data**  
Edit the attributes common to the household and edit details specific to each person and address.

**Household**

Household Name (Override) Household Phone Number Private

(406) 555-1212 x  ☐

**Household Locations**

Address	Start	End	Private	Secondary	Mailing
1227 Rimrock Rd , Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Household Members**

Name	Birthdate	Gender	Start	End	Private	Secondary
Redford, Robert	01/16/2004	M	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redford, David		M	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save & Continue - Step 3 »

For multiple addresses, click *Mailing* and *Secondary* for a P.O. Box and nothing for the physical address.

**Household Locations**

Address	Start	End	Private	Secondary	Mailing
1227 Rimrock Rd , Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P.O. Box 99, Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Census Wizard - Edit Household Membership

### Step 2: Editing Household Data

Edit the attributes common to the household and edit details specific to each person and address.

Household						
Household Name (Override)	Household Phone Number		Private			
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>			
Household Locations						
Address	Start	End	Private	Secondary	Mailing	
1227 Rimrock Rd., Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
P.O. Box 99, Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Household Members						
Name	Birthdate	Gender	Start	End	Private	Secondary
Redford, Robert	01/16/2004	M	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redford, David		M	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save & Continue - Step 3 »						

Enter *Start* dates for all **Household Members**.

Click **Save & Continue – Step 3**.

Find the line that says *Relationships to Student*.

Complete *Relationship*, *Start Date* and mark the boxes for *Guardian*, *Mailing* and *Portal* as appropriate.

Click **Save & Done**.

**NOTE:** Only complete this information for the student. Do **not** attempt to complete this information for adult household members.

## Census Wizard - Edit Relationships

### Step 3 - Edit Relationships of Household Members

Edit the relationships between the family members.

Relationships to Redford, David											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Redford, Robert	01/16/2004	M	father/child	08/01/2014	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationships to Redford, Robert											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Redford, David		M	father/child	08/01/2014	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save & Done											

Index Search Help <

All People

Redford Go

Advanced Search

Search Results: 2

Redford, David

Redford, Robert [01/16/2004]

## Redford, David

Gender: M

### Demographics

Identities

Households

Relationship



Save



Delete



Person Summary Report



De

### Person Information

PersonID 583

\*Last Name

\*First Name

Middle Name

Suffix

Redford

David

\*Gender

Birth Date

Soc Sec Number

Male

### Race/Ethnicity (Edit)

State Race/Ethnicity:

Federal Designation:

No Data

Race(s):

Hispanic/Latino:

No Data

Race/Ethnicity Determination:

## STEP 5 – Contact Information (Optional)

Districts may choose to enter contact information for adult household members, including contact phone and/or email.

Click the **Search** tab. Select **All People**. Enter the person's last name and click **Go**.

Click the name of the person under **Search Results**.

Scroll down to the **Personal Contact Information** section and enter *phone number(s)* and/or *email*.

Click **Save**.

Personal Contact Information		Messenger Preferences Contact Reasons						
Contact Information	Private	Emergency	Attendance	Behavior	General	Priority	Teacher	
Email: d_redford@yahoo.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Secondary								
Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cell Phone:								
(406) 222-3333 x	<input type="checkbox"/>							
Other Phone:								
( ) - x	<input type="checkbox"/>							
Work Phone:								
( ) - x	<input type="checkbox"/>							
Pager:								
( ) - x	<input type="checkbox"/>							
Preferred Language								
en_US: US English								
Comments								

- Modified by: Unknown



Achievement  
in Montana  
Montana's State Student  
Information System



Montana  
Office of Public Instruction  
Denise Juneau, State Superintendent  
opi.mt.gov

Creating Households

September 2014



## STEP 6 – Non Household Relationships (Optional)

Click the **Search** tab. Select **All People**. Enter the student's last name and click **Go**.

Click the student's name from **Search Results**. The **Demographics** tab should be the first tab visible (if not, return to the **Index**, expand **Census** and click **People**).

Click the **Relationships** tab.

Click **New Non-Household Relationship**.

Enter the person's last name and click **Search**.

If the person already exists, click the name to add them to the student.


If the person does not exist, click **Create New Person**.

Enter **Last Name**, **First Name** and **Gender**. Click **Save**.

**Redford, Robert**  
Grade: 03 DOB: 01/16/2004 Gender: M

**Person Search**  
Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.

\*Last Name:   
First Name:   
Middle Name:   
Birth Date:   
Gender:

[Details](#)  **Griffith, Andy** M  
PersonID: 585

After adding the person, click From the **New Person** screen, click **New Non-Household Relationship**. Enter the last name, and click **Search**.

When the person's name appears in the Person Search results, click the name to add the relationship to the student, then click the red X to return to the Relationships screen.

Select **Relationship**, enter **Start Date** and check **Guardian**, **Mailing** and **Portal**, if appropriate.

Click **Save**.

**Redford, Robert**  
Grade: 03 DOB: 01/16/2004 Gender: M

Demographics Identities Households **Relationships** Enrollments District Employment District A

**Relationships within the "Primary Household Relationships"**

Name	Gender	Relationship	Start Date	End Date	Emergency	Priority	Guardian	Mailing	Portal	Messenger	Private
Redford, David M		father/child	08/01/2014				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Non-Household Relationships**

Name	Gender	Relationship	Start Date	End Date	Emergency	Priority	Guardian	Mailing	Portal	Messenger	Private
X Griffith, Andy F		emergency contact	08/01/2014				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Year 14-15 School All Schools Calendar All Calendars

Index Search Help <

System Administrator

- Student Information
- Instruction
- Census
- Behavior
- Health
- Attendance
- Scheduling
- Grading & Standards
- Programs
- Ad Hoc Reporting
- User Communication
- Assessment
- System Administration
  - Attendance
  - Auditing
  - Batch Queue
  - Calendar
  - Census
  - Impact Aid Site
  - Relationship Type**

Relationship Type

Save Delete New

Relationship Type Editor

Name Guardian

emergency contact

father/child

guardian

mother/child

other

Detail Information

\*Name Guardian

Counselor ☐

To add *Relationships*, return to the **Index**. Expand **System Administration** and **Census**. Click **Relationship Type**.

Click **New**. Type the *Name* and click **Save**.

Index Search Help <

Household

Kent Go

Advanced Search

Search Results: 2 households

Household (2 members)

125 Parkhill Street , Someplace

Kent , Clark A #999100011 [07/25/199

Kent , Father

Kent (2 members)

560 Short Street , Someplace

Kent , Mom (guardian)

Kent , Clark A #999100011 [07/25/199

Students may live among more than one household (parents divorced, student in foster care, etc).

These students need two households created.

Create additional households for the student using the same process shown above.

A slight variation occurs when the student lives with one parent, but has visitation with another parent, in another town.

On the second step of the **Census Wizard**, mark the student *Secondary* under **Household Members** – this is the student's secondary household (this is not their primary residence).

**Census Wizard - Edit Household Membership**

**Step 2: Editing Household Data**  
Edit the attributes common to the household and edit details specific to each person and address.

**Household**  
Household Name (Override)  Household Phone Number (406) 555-1212  Private ☐

**Household Locations**  
Address 123 Washington Ave , Anywhere MT 55555 Start 08/01/2011  End  Private ☐ Secondary ☐ Mailing ☐

**Household Members**

Name	Birthdate	Gender	Start	End	Private	Secondary
Judd, Wynonna	05/10/2005	F	08/01/2011	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Judd, Dad		M	08/01/2011	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save & Continue - Step 3 »

Index Search Help <

Household

Kent

Advanced Search

Search Results: 1 households

**Kent (4 members)**

- 125 Parkhill Street , Someplace
- Kent , Mom (guardian)
- Kent , Clark A #999100011 [07/25/199
- Kent , Father
- Kent , Gramma

**Kent Household**

Household Info Addresses Members

**Household Information**

Name  Phone Number ( ) - - x Private ☐

Comments

- Modified by: Administrator, System 08/27/2014 16:25

## Adding/Removing Household Members

Household members should **never** be deleted – unless they were added in error.

Click the **Search** tab. **Select Household.**

Click **Go**.

Click the **Members** tab.

Click the name of the member to remove from the household.

Enter an *End Date* and click **Save**.

### Kent Household

Household Info | Addresses | **Members**

Save Delete Find New Member

Name	Start Date	End Date	Secondary	Private
Kent, Clark A	08/01/2014			
Kent, Father	08/01/2014			
Kent, Gramma	08/01/2014			
Kent, Mom	08/01/2014			

#### Household Member Detail

Name  
**Kent, Gramma**

Start Date: 08/01/2014      End Date: 10/12/2014

Secondary: ☐      Private: ☐

### Kent Household

Household Relationships

You are about to end the household membership for Gramma Kent in this household. What would you like to do with the household relationships.

☒ Keep the relationships.  
(You can manually end or delete these relationships later.)

☐ End the relationships by adding an end date.  
08/27/2014

☐ Delete the relationships.  
(Warning: this will leave no historical record of these relationships.)

Ok Cancel

When prompted, choose the appropriate action.

Click **Ok**.

## Splitting Households

If a student's household separates into two distinct households, create a new household for the exiting parent.

First, exit the leaving parent from the household following the instructions above.

The *End Date* should be at least yesterday for two separate households to appear in the **Search Results**.

### Kent Household

Household InfoAddresses**Members**

SaveDeleteFind New Member

Household Member Editor				
Name	Start Date	End Date	Secondary	Private
Kent, Clark A	08/01/2014			
Kent, Father	08/01/2014	12/27/2014		
Kent, Gramma	08/01/2014	10/12/2014		
Kent, Mom	08/01/2014			

### Household Member Detail

Name  
Kent, Father

Start Date  
08/01/2014

End Date  
12/27/2014

Secondary  
☐

Private  
☐

### Kent Household

Household Relationships

You are about to end the household membership for Gramma Kent in this household. What would you like to do with the household relationships.

☒ Keep the relationships.  
(You can manually end or delete these relationships later.)

☐ End the relationships by adding an end date.  
08/27/2014

☐ Delete the relationships.  
(Warning: this will leave no historical record of these relationships.)

OkCancel

When prompted, choose **Keep the relationships**.

Click **Ok**.

Follow the instructions above to create a second household for the student.

The student will have two separate households.

The screenshot shows a web interface with tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below the tabs is a search bar with a dropdown menu set to 'Household'. To the right of the search bar is a 'Go' button. Below the search bar is a text input field containing 'Kent' and another 'Go' button. Below the search bar is a link for 'Advanced Search'. The search results are displayed below the search bar, showing 'Search Results: 2'. The results are listed as follows:

- Carey (2 members)
  - 567 1st St West, Somewhere
  - Carey, Mom
  - Carey, Mariah #15 [10/03/2001]
- Carey (2 members)
  - 432 W Anderson Ave , Somewhere
  - Carey, Dad
  - Carey, Mariah #15 [10/03/2001]

For further assistance, contact the AIM Help Desk at [opiainhelp@mt.gov](mailto:opiainhelp@mt.gov) or 1-888-424-6681.

